



TS EAS

Tuesday 4th of August

2.00 pm PDT / 3.00 pm MDT / 4.00 pm CDT / 5.00 pm
EDT / 10.00pm BST / 11.00 pm CEST/ 7.00am

Wednesday AEST

Updates from EAC revision meetings

EAC-CPF revision process

Silke



What happened so far...

- Start with EAC-CPF subteam of TS-EAS in 2017
- 1st phase ended with minor release with updates and bug fixes in December 2018
- Beginning 2019 start of 2nd phase for major release with pending general issues
 - Starting monthly virtual meetings
 - Development of a core team and regular guests
- Aim to finish the revision this year with a public call for comments
- Finalise revision next year with **EAC-CPF 2.0**



Topics to deal with

- Names
- Dates
- Assertion description
- Relations
- Identifiers
- EAD3 Reconciliation
- Namespaces
- Spelling
- @[...]type attributes



Schema team

1. Namespaces

- Remove XLink ns, use a reduced set of attributes
- Remove XML ns
- EAC-CPF namespace

2. Spelling

- **camelCase**

3. @[...]type attributes

- Thursday



Decisions

1. Best Practise Guide

- Show example encoding for repeating tricky cases
- Explain encoding approach and recommend standards, policies, todos
 - Names, dates, identifiers, assertion, relation, multilingual aspects, various entity types ...
- Ongoing maintenance (?)



Decisions

2. Names

- Simplify encoding of names by using attributes to indicate a preferred form, an authorised or alternative form of a name by using attributes
- Strengthen the control area by referencing declarations made for the EAC-CPF instance
- Rename the wrapper element `<nameEntryParallel>` to use a distinct element name



Decisions

3. Dates

- Provide rules for unknown, open and uncertain dates following EDTF
- Adding optional attributes @certainty, @fromDate, @toDate to all date elements
- Review availability of date elements
- Otherwise keep date elements untouched: //date | //dateRange | //dateSet



Decisions

4. Assertions

- New element: `//source/citedRange`
- 3 new attributes: `@conventionDeclarationReference`, `@sourceReference`, `@maintenanceEventReferece` in all (non-empty) elements, besides control area

These additions provide the ability to add supporting evidence to assertions in EAC in a standards-based way that also fulfills the scholarly need to provide citations, as well as allow implementers to link elements, such as name entries, to their corresponding convention declaration.



Decisions

5. Relations

- New wrapper element `//relations/relation` replaces: `//cpfRelation`, `//resourceRelation`, and `//functionRelation`
- New set of child elements to structure the description of relations:
 - `//targetEntity`
 - `//relationType`
 - `//targetRole`
 - `//date | //dateRange | //dateSet`
 - `(//places)`



Decisions

5. Relations

- New optional attributes to identify vocabularies/ontologies:
 - @vocabularySource
 - @vocabularySourceURI
 - @valueURI



Decisions

6. Identifiers

- No major changes for elements
- Relax elements content restrictions, like regex patterns
- Use attributes to indicate the identifiers status and to refer to vocabularies or other sources
- Use Best Practice Guide to explain the ID usage



Decisions

7. EAD3 Reconciliation

- Towards a shared schema
- Shared elements: 52 shared elements, 37 in control area
 - Aligned definition, model, description and attributes
- Similar elements: discussed differentiation for name and place elements
 - Update documentation accordingly
 - Some of the pending issues to discuss today, remaining ones during upcoming EAC team meetings

Using `` in EAC-CPF

Silke



 vs. <emph>

- Formatting element for marking words or phrases that are emphasized for linguistic effect or specially formatted
- Available in (some) text elements
- Attribute to indicate the kind of emphasis (bold, italic etc.)
- Alignment of EAC-CPF and EAD3 is preferred

Looking for use cases and examples for and/or <emph>

Referencing

Kerstin





Internal references to rules and sources

- Current status
 - EAC-CPF: attribute `@(xml:)id`
 - Available with all elements, but no possibility to point to these from within an EAC-CPF instance
 - EAD: attributes `@id` and `@target`
 - `@id` available with all elements, possibility to point to these from most EAD elements via sub-elements `<ref>` or `<ptr>` with `@target` attribute
- Suggested change
 - Introduce new attributes `@conventionDeclarationReference`, `@maintenanceEventReference`, and `@sourceReference` to specifically point to rules, sources and maintenance events (with agents and dates)
 - Enable these elements with all elements in `<cpfDescription>` that can either contain text themselves or via their sub-elements



Internal references from and to any element

- Current status
 - EAC-CPF: attribute `@(xml:)id`
 - Available with all elements, but no possibility to point to these from within an EAC-CPF instance
 - EAD: attributes `@id` and `@target`
 - `@id` available with all elements, possibility to point to these from most EAD elements via sub-elements `<ref>` or `<ptr>` with `@target` attribute
- Options for a joint approach
 - Introduce attribute `@target` to EAC-CPF, e.g. to point from an element within `<description>` to an element within `<relations>`
 - Either in the same way as EAD3, i.e. by additionally introducing the element `<ref>` where `@target` would then be used
 - Or by moving `@target` out of `<ref>` and enabling it for **all elements (?)** in both EAS



Internal references from and to any element

- Encoding examples for comparison

Encoding with @id and @target on non-empty elements

```
<appraisal target="SepMat1">
  <p>This collection was re-appraised to
  facilitate use by weeding the collection of materials no
  longer deemed as having evidential value. A list of materials
  removed is provided at the end of this guide.</p>
  <p target="SepMat1">List of removed materials</p>
</appraisal>
<separatedmaterial>
  <list id="SepMat1">
    <item>Record 1 removed</item>
    [...]
  </list>
</separatedmaterial>
```

Encoding with @id and <ref@target>

```
<appraisal>
  <p>This collection was re-appraised to facilitate use by
  weeding the collection of materials no longer deemed as
  having evidential value. A list of materials removed is
  provided at the end of this guide.
  <ref target="SepMat1">List of removed materials</ref>
</appraisal>
<separatedmaterial>
  <list id="SepMat1">
    <item>Record 1 removed</item>
    [...]
  </list>
</separatedmaterial>
```



External references to vocabularies

- Current status
 - EAC-CPF: attribute @vocabularySource
 - Only with <term>, <placeEntry> and <placeRole>
 - EAD: attributes @source and @identifier
 - With controlled access terms, e.g. <corpname>, with <part>, <physfacet>, <term>, <unitid>, and <unittyp>
- Suggested change
 - Based on proposal to align <relations>
 - Using three attributes of @vocabularySource (for a literal value), @vocabularySourceURI, and @valueURI
 - Used with any element in both EAS the content of which could be represented by a URI



External references to other resources

- Current status in EAC-CPF
 - Element <citation> with @(xlink:)href etc.
 - With all singular elements, e.g. <function>, <mandate>, <occupation>, <place>, with <biogHist> , with <*Declaration> elements in <control>
 - Currently also with plural elements, though EAC team has decided last week to keep the plural elements simple, only including “their” singular element plus <descriptiveNote>



External references to other resources

- Current status in EAD3
 - Element <citation> with @href etc.
 - Used with <*declaration> elements in <control>
 - Element <ref> (and element <ptr>) with @href etc.
 - Used with <abstract>, <addressline>, <archref>, <author>, <bibref>, <citation>, <container>, <date>, <datesingle>, <didnote>, <dimensions>, <edition>, <emph>, <entry>, <event>, <fromdate>, <head>, <head01>, <head02>, <head03>, <indexentry>, <item>, <label>, <materials-spec>, <num>, <p>, <part>, <physdesc>, <physfacet>, <physloc>, <ptrgrp>, <publisher>, <quote>, <sponsor>, <subtitle>, <titleproper>, <today>, <unitdate>, <unitid>, <unittitle>
 - Elements <archref> and <bibref> with @href etc.
 - Used with <bibliography>, <otherfindaid>, <relatedmaterial>, <separatedmaterial>



External references to other resources

- Options for a joint approach
 - Using **two elements** for external resources depending on the contexts wherein they are used
 - `<citation>` in `<control>` (and maybe instead of `<archref>` and `<bibref>` in EAD3?) for both EAS
 - `<reference>` in (most) other contexts for both EAS
 - Deciding to **only** use **one element** independent from its context
 - I.e. either using only `<citation>` or only `<reference>` in both EAS
 - **Remodelling** how such **references** are done and using attributes `@href` etc. directly with the (current) parent elements of `<citation>` and `<ref>` (et al.)



External references to other resources

- How could remodelling look like? - Overview
 - Use @valueURI, @vocabularySource, and @vocabularySourceURI to point to an external vocabulary, ontology, thesaurus etc.
 - Use @href, @linkRole, and @linkTitle to point to any other external resource
 - Use @conventionDeclarationReference and @sourceReference to point to rules and sources declared within the EAS instance
 - Add <term> or <title> to current parent elements of <citation> and <ref> in both EAS where it would not be possible to encode the name or title of the cited resource otherwise



External references to other resources

- How could remodelling look like? - Encoding examples

Current encoding of a **simple reference** (without link)

```
<conventionDeclaration>  
  <citation> National Council on Archives, Rules for the  
  Construction of Personal, Place and Corporate Names,  
  1997 </citation>  
</conventionDeclaration>
```

Suggested new encoding of a **simple reference** (without link); here: using the more appropriate <title> element

```
<conventionDeclaration>  
  <title> National Council on Archives, Rules for the  
  Construction of Personal, Place and Corporate Names,  
  1997 </title>  
</conventionDeclaration>
```



External references to other resources

- How could remodelling look like? - Encoding examples

Current encoding of a **general reference** (with link)

```
<rightsdeclaration>
  <abbr>CC0</abbr>
  <citation href="https://creativecommons.org/
publicdomain/zero/1.0/">
  <descriptivenote>
    <p>CC0 1.0 Universal (CC0 1.0)</p>
  </descriptivenote>
</rightsdeclaration>
```

Suggested new encoding of a **general reference** (with link); here: moving linking attributes to parent element and naming of the linked reference to <title> element

```
<rightsdeclaration href="https://creativecommons.org/
publicdomain/zero/1.0/">
  <abbr>CC0</abbr>

  <title>CC0 1.0 Universal (CC0 1.0)</title>

</rightsdeclaration>
```



External references to other resources

- How could remodelling look like? - Encoding examples

Current encoding of a **vocabulary reference** (with link)

```
<rightsDeclaration>  
  
<abbr>CC0</abbr>  
<citation href="https://creativecommons.org/  
publicdomain/zero/1.0/">  
<descriptivenote>  
  <p>CC0 1.0 Universal (CC0 1.0)</p>  
</descriptivenote>  
</rightsDeclaration>
```

Suggested new encoding of a **vocabulary reference** (with link); here: moving linking attributes to parent element and naming of the linked reference to <title> element

```
<rightsDeclaration href="https://creativecommons.org/  
publicdomain/zero/1.0/">  
  <abbr>CC0</abbr>  
  
  <title>CC0 1.0 Universal (CC0 1.0)</title>  
</rightsDeclaration>
```



External references to other resources

- How could remodelling look like? - Encoding examples

Current encoding of a **vocabulary terms** (without link)

```
<function>  
  <term>Higher Education Funding for England</term>  
</function>
```

Suggested new encoding of a **convention reference** (with internal link); here: having the convention declared in <control> and pointing to that

```
<conventionDeclaration id="cd1"  
  href="https://www.legislation.gov.uk/ukpga/2017/29/section/1">  
  <title>Higher Education and Research Act 2017</title>  
</conventionDeclaration>  
[...]  
<function conventionDeclarationReference="#cd1">  
  <term>Higher Education Funding for England</term>  
</function>
```

<abbreviation>

Kerstin



Current status

- EAC-CPF uses <abbreviation>:
 - To encode abbreviation or code for identifying a thesaurus, controlled vocabulary, or other standard
 - Only with <conventionDeclaration>, <localTypeDeclaration>, <rightsDeclaration>
 - As optional and not repeatable
- EAD3 uses <abbr>:
 - In the same way as EAC-CPF within <control>, but also...
 - ... to encode the shortened form of a(ny) word or phrase
 - As optional and repeatable
 - Essentially everywhere (see tag library for details
<https://www.loc.gov/ead/EAD3taglib/EAD3.html#elem-abbr>)



Suggested changes

- Rename `<abbreviation>` respectively `<abbr>` within `<control>`
 - Suggested name: `<vocabularyCode>`
 - Could apply to both EAS
 - Would follow the very specific scope of the element in the context `<conventionDeclaration>`, `<localTypeDeclaration>`, `<rightsDeclaration>`
 - Would allow for a content model following the current approach in EAC-CPF ([token] instead of [text]; no sub-elements)
 - Would minimise confusion in EAD3
 - Would allow EAD to continue using `<abbr>` in all other sections
 - Would allow EAD to rename `<abbr>` to `<abbreviation>` in the next major revision (following the principle to avoid abbreviated tag names)

Best Practice Guide

Ailie





Best Practice Guide

- Growing document
- Start with:
 - General groups of elements (names, dates, rules) with a variety of examples and different approaches
 - Complex objects (e.g. <control>)
 - New and changed elements/sections
 - Assertion descriptions
 - Use of multiple languages
 - Rules/conventions
 - Uncertain dates
 - Multiple names
 - Sources
 - Relations
 - Functions



Tag Library

- We need **real life examples** and use cases!

Date model changes

Kerstin



Decision taken in the context of reconciliation

- Attributes (in both EAS)
 - Adding a new attribute @status to single date elements, i.e. <date>, <fromDate>, <toDate> to indicate their status as “unknown” or “open”
 - Enabling attributes @calendar and @era for single date elements
 - Enabling attribute @certainty for single date elements with recommended use of the EDTF values "uncertain", "approximate", or "uncertain and approximate"
- Schema change for <dateRange> (in both EAS)
 - Either <fromDate> or <toDate> has to be used, i.e. <dateRange> cannot be left without sub-elements
 - However, both sub-elements can be left empty, using the new attribute @status to indicate an “unknown” or “open” date



Intended change in future major revision of EAD

- Current status for single date element(s)
 - EAC-CPF currently uses <date>, <dateRange>, <dateSet>
 - EAD3 currently <datesingle>, <daterange>, <dateset>, plus an additional <date> element when used in context of descriptive texts
- Background for the naming in EAD3
 - Aim to distinguish between single date element used in mixed (<date>) and non-mixed content contexts (<datesingle>)
- Next step in reconciliation work
 - Do not shift name distinction to EAC-CPF as it only has one version of this specific single date and does not need to accommodate two versions in itself
 - Inclination to deprecate (or completely remove) the current <date> element as mixed content element from EAD and to rename the current <datesingle> to <date> to be used in the same way as in EAC-CPF

See you tomorrow!

Wednesday 5th of August

6.00 am PDT / 7.00 am MDT / 8.00 am CDT / 9.00 am EDT /
2.00pm BST / 3.00 pm CEST / 11.00pm AEST